



THE COMMONWEALTH OF MASSACHUSETTS
MILITARY DIVISION
THE ADJUTANT GENERAL'S OFFICE
50 Maple Street, Milford MA 01757-3604

02-25

1 October 2002

PERSONNEL - EDUCATION SERVICES

The following memorandum was received from Director, National Guard Bureau, (NGB-ARH) Washington, DC, Dated 25 September 2002 and is reprinted for your information.

SUBJECT: FY03 Army National Guard, Education Program (Policy Number 03-01)

1. A copy of this correspondence should be filed at the Unit level.
2. POC for this program is the Education Services Officer at DSN 256-6753, commercial (508) 233-6753, or by email at education@ma.ngb.army.mil.
3. **Widest dissemination of this information is encouraged.**

FOR THE ADJUTANT GENERAL:

//s//
JAY F. DALEY
LTC, IN
Deputy Chief of Staff, Personnel

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SUMMARY OF CHANGES

FY03 ARNG Education Program Policy

Note:

These are just highlights of the changes to this year's policy and are not intended to be ALL of the changes. Please be sure you carefully read/review the entire FY03 ARNG education policy to ensure you can effectively and uniformly administer the ARNG education program in your State.

-Rate change. New rate is **\$200** per semester hour up to **\$4,000** per soldier, per fiscal year. This amount **may not exceed 75 percent** of the tuition cost for the course. (Para 4d).

-**Fees** required for the instruction of the course or that are a requirement to all students for 'enrollment purposes' are now authorized up to **\$500** per soldier, per fiscal year. This amount **may not exceed 75 percent** of the cost of the aforementioned fees. Note: This amount is included in the \$4,000 annual cap (Para 4d).

-**DA Form 2171E (horizontal form)** will be used instead of DA Form 2171 (vertical form) (Para 5b).

-All States WILL use the Information Management and Reporting System (**iMARC**) to implement their ARNG FTA Program beginning in FY03 (Para 5c).

-Distance Learning (DL) tuition assistance requests will no longer be paid separately by DANTES. States must pay all tuition assistance requests, regardless of the method, (i.e. classroom, DL, etc...) from the ARNG FTA funds allocated to their State (Para 5c).

-All Distance Learning requests, regardless of length, will use the DA Form 2171E. The DANTES Form 1562 will no longer be used for DL requests (Para 5c).

-Use of ARNG FTA funds on anything other than tuition and authorized expenses is **not** authorized (Para 6b).

-The previous caps for ARNG FTA and MGIB-SR **are removed**. Soldiers eligible for the MGIB-SR may receive ARNG FTA up to the current authorized levels provide the student is enrolled at least **½ time or more** (Para 6c).

-Simultaneous payment of ARNG FTA to soldiers eligible for the MGIB-AD is authorized only if the soldier is **not a MGIB Kicker recipient** (Para 6c).

-Soldiers eligible for ARNG FTA and a Pell Grant will now apply the Pell Grant **first** and ARNG FTA to the balance **not** covered by the grant (Para 6c).

-ESOs will ensure an AARTS transcript is produced for all soldiers prior to approving ARNG FTA funds (Para 7d).



DEPARTMENTS OF THE ARMY AND AIR FORCE
NATIONAL GUARD BUREAU
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NGB-ARH

25 September 2002

MEMORANDUM FOR SEE DISTRIBUTION

SUBJECT: FY03 Army National Guard, Education Program (Policy Number, 03-01)

1. REFERENCES.

- a. United States Code (USC), Section 2007, Payment of Tuition for Off-Duty Training or Education.
- b. Department of Defense Directive 1322.8, Voluntary Education Programs for Military Personnel.
- c. Department of Defense Instruction 1322.25, Voluntary Education Programs for Military Personnel.
- d. AR 621-5, 17 Nov 93, Subject: Army Continuing Education System.

2. PURPOSE. This memorandum establishes policy to administer the ARNG Education Program. The program includes ARNG Federal Tuition Assistance (FTA), various State Tuition Assistance programs, the Montgomery G.I Bill Selected Reserve (MGIB-SR), MGIB Kicker Program (covered under a separate policy) and various education support programs available through the Defense Activity for Non-Traditional Education Support (DANTES) and the Servicemembers Opportunity Colleges (SOC).

3. IMPLEMENTATION. The ARNG Education Program is developed based on guidance provided by the Department of the Army and the Army Continuing Education System (ACES). Education Services Officers (ESOs) will follow AR 621-5 and this policy to implement the ARNG Education Program.

4. ARNG FTA OVERVIEW. Financial assistance through ARNG FTA will be provided for voluntary off-duty civilian education programs in support of a soldier's professional or personal self-development goals per the following guidance.

a. Eligibility.

(1) ARNG Traditional Soldiers. ARNG traditional soldiers in an active drilling status who are coded as a 'satisfactory participant' are eligible to receive ARNG FTA. In addition, ARNG traditional soldiers who are federally mobilized or serving

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on Active Duty (i.e. ADSW, ADT, etc...) who are denied TA due to funding limitations through their servicing Army Education Center are also eligible to receive ARNG FTA.

(2) ARNG AGR Soldiers. ARNG AGR soldiers (Title 10/32) are not eligible to receive ARNG FTA. AGR soldiers are eligible for TA through their servicing Army Education Center.

(3) ARNG Civilians. ARNG Civilians (Federal or State) are not eligible to receive ARNG FTA.

b. Authorized Uses/Accreditation. ARNG FTA will only be used to pay for courses offered by institutions that are accredited or that have been approved as a candidate for accreditation by a national or regional accrediting agency recognized by the U.S. Department of Education (DOE). For non-degree bearing programs, secondary school accreditation or specialized accreditation (professional/occupational) is required. This requirement is applicable to classroom study, vocational/technical training and distance learning courses.

(1) To determine which colleges/universities are accredited, ESOs will use the *Accredited Institutions of Post-Secondary Education Guide* which is published in consultation with the American Council on Education (ACE). The guide is distributed annually by DANTES (Stock Number, 2416) to each State ESO. The guide is also available at www.nces.ed.gov/ipeds or www.ed.gov/offices/OPE/students/accred. If a college/university is not in the guide, it is not accredited by a DOE recognized agency and is not eligible for ARNG FTA.

(2) A listing of accredited distance learning courses can be found via the methods described above or by reviewing the DANTES Independent Study Catalog, DANTES External Degree Catalog, or the DANTES Nationally Accredited Distance Learning Programs Catalog which are distributed annually to each State ESO by DANTES. The catalogs can be accessed through the MA ARNG Education Benefits Web site at <http://www.state.ma.us/guard/education>. Click the 'Distance Learning' main menu option, then click 'DANTES Distance Learning' hyperlink. The catalogs can also be accessed on the DANTES Web site at <http://www.voled.doded.mil>.

c. Authorized Levels. Soldiers may use ARNG FTA to receive one credential from each of the following levels.

- (1) Secondary School (High School) Diploma or its equivalency (GED);
- (2) Certificate (undergraduate, graduate, vocational, technical, licensure);
- (3) Associate;

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(4) Baccalaureate;

(5) Master's or First Professional.

Note. Only soldiers who have not obtained a master degree are eligible to use ARNG FTA for a first professional degree. Examples of first professional degrees include Architecture, Certified Public Accountant, Podiatry (D.P.M.), Dentistry (D.D.S. or D.M.D), Medicine (M.D.), Optometry (O.D.), Osteopathic Medicine (D.O.), Pharmacy (D. Phar.), Law (J.D.), and Theology (M.Div or M.H.L.).

d. Authorized Rates. The following ARNG FTA rates are authorized for FY03.

(1) Up to **\$200 per semester hour** (SH) or \$133 per quarter hour (QH). This amount may not exceed 75 percent of the tuition cost of a course. As an exception, ESOs may authorize up to 100 percent of the costs associated with obtaining a high school diploma or its equivalent (GED).

(2) Up to **\$500** per fiscal year may be applied towards **authorized fees**. This amount may not exceed 75 percent of the cost of authorized fees. Authorized fees are only those fees charged by the institution that are a requirement to 'all students' for enrollment purposes or are directly related to the instruction of the course for which ARNG FTA is being provided. ARNG FTA will not be used for the purchase of textbooks unless they are included in the institution's published tuition rate. **Specific guidance regarding the use of ARNG FTA for the payment of authorized fees at Massachusetts State Colleges, Universities and Community Colleges will be published no later than 1 November 2002 and will be made available on the MA ARNG Education Benefits Web site at <http://www.state.ma.us/guard/education>, as well as in a hard copy "Personnel Pipeline" format that will be distributed statewide on 1 November 2002.**

(3) The total amount of ARNG FTA (tuition and fees) each soldier is entitled to receive during FY03 will not exceed **\$4,000**.

e. Goal Declaration and Degree Plans. ARNG soldiers must declare an educational goal (i.e. degree, credential, certification or licensure) before ARNG FTA can be used/approved.

5. ARNG FTA ADMINISTRATION. The ARNG FTA Program is an '**Up-Front**' **TA program**. Under this program, payments are made directly to the accredited college/institution for the ARNG's portion of the soldier's tuition cost. ESOs will establish an 'up front' payment system with the financial aid personnel at their colleges/universities in order to prevent soldiers from having to pay tuition costs on their own and receiving reimbursement later. Under extenuating circumstances,

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soldiers may be authorized by the ESO to be directly reimbursed. Cases of direct reimbursement will be annotated by the ESO in the comment section of the Information Management and Reporting Center (iMARC). **All MA ARNG personnel are encourage to visit the MA ARNG Education Benefits Web site at <http://www.state.ma.us/guard/education> for specific instructions regarding the NEW 'Up-Front' payment procedures. Click on the 'Tuition Assistance' main menu option, then click on the 'ARNG Federal Tuition Assistance' hyperlink.**

a. Service Commitment.

(1) Enlisted soldiers and warrant officers must have sufficient time remaining before their current service obligation/Expiration Term of Service to complete the course unless involuntarily separated with an honorable discharge.

(2) Commissioned officers must have at least **four (4) years** of Selected Reserve service remaining from the date of completion of the course for which TA is provided.

b. Forms. The following forms will be used for the administration of ARNG FTA.

(1) Statement of Understanding (SOU) – Soldier. Prior to any commitment of funds, the ESO will ensure the soldier understands his/her responsibilities regarding ARNG FTA as well as the restrictions regarding the duplication of federal funding by signing a statement of understanding each fiscal year (see enclosure 3).

(3) DA Form 2171-E. The DA Form 2171-E, Request for Tuition Assistance Army Continuing Education System (***horizontal version***) serves as a contract between the government and the institution and is the only form authorized for the administration of the ARNG FTA program. ESOs will only approve 2171's that are received prior to the end of the institution's late registration period or the beginning of the course, whichever is most advantageous to the soldier. (see enclosures 1 [sample form] and 2 [blank form]).

c. Payment Processing. ESOs are responsible for managing the allocation of ARNG FTA funds by inputting each request for ARNG FTA into the Information Management and Reporting Center (iMARC) System. Use of the iMARC system to administer, manage and report ARNG FTA information is a mandatory requirement of all States beginning in FY03.

(1) Distance Learning (DL). Beginning in FY03, all requests for DL TA will no longer be funded separately by DANTES but will be paid using the ARNG FTA funds allocated to each State/Territory. To process a request for ARNG FTA via DL, ESOs will ensure DL is indicated as the delivery method in 'block I' of the DA Form 2171-E

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and process the request according the centralized or non-centralized SOP. In addition, all requests for ARNG FTA via DL (regardless of course length) will be handled as an 'Up-Front' request using the DA Form 2171-E. The DANTES Form 1562, the Up-Front TA Authorization Form, and the Special Enrollment Procedures Form will no longer be used for DL requests.

(4) Clock Hours (CH). CHs for **vocational/technical training courses** offered by accredited post secondary institutions. To fund a course according to CHs, ESOs must convert CHs to SHs by dividing the total number of CHs by 15 to determine the number of SHs and then dividing the cost of the course by the number of SHs to determine the cost per SH. For example, a Microsoft Office Training Course offered by an accredited institution that costs \$1,800 and meets for 120 CHs would equal 8 SH (120/15) and cost \$225 per SH (1800/8).

d. Recoupment. ESOs are responsible for verifying the course completion status (by receipt of an official grade report or transcript) of all soldiers who apply for and receive ARNG FTA. ESOs will ensure ARNG FTA funds provided to soldiers who receive a failing grade, fail to complete the course or fail to submit grades within five (5) weeks after course completion are recouped unless there are extenuating circumstances due to no fault of the soldier.

(1) ESOs will recoup 100% of the ARNG FTA funds provided to soldiers who are discharged prior to completing Initial Active Duty for Training (IADT).

(2) Commissioned officers who fail to complete the required 4 year obligation will be required to reimburse the amount of TA according to the following formula; Amount of TA divided by 48, multiplied by the remaining amount of obligation. For example, an officer receives \$563 in ARNG FTA but departs 24 months before completion of the four-year obligation. $\$563/48 = 11.73 \times 24 = \282 to be recouped.

6. ARNG FTA FUNDING. Funding for the ARNG FTA program is based on State end-strength, State tuition assistance benefits offered and historical and projected ARNG FTA use. ESOs will receive their annual funding plan (AFP) information via the administration center in iMARC prior to the beginning of the fiscal year (FY). ARNG FTA funds for centralized States will be sent to DANTES. ARNG FTA funds for non-centralized States will be sent to each State via a MIPR or FAD during the first week of each quarter (i.e. Oct, Jan, Apr, Jul). States requiring additional funds may submit a request for additional ARNG FTA funds to the Chief, NGB-ARH. ARNG FTA Funds will be obligated based on the start date of the course. **Therefore, the FY the course starts in, is the FY the funds must be paid from.**

a. Priority of Funds. ESOs are reminded that the ARNG FTA Program is based on the availability of funds and cannot be guaranteed to all soldiers. Using the guidelines established in AR 621-5, paragraph 2-10, ESOs will establish a

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priority of funding to help them achieve and maintain the highest state of personnel readiness in their state.

b. Purchase of Education Related Items and Equipment. States are NOT authorized to purchase education related items/resources and/or equipment using ARNG FTA funds. States in need of additional funds to purchase education related items/resources must send a request to the Chief, NGB-ARH. Each request must include the name of the item(s), exact cost and an explanation of how the item(s) will be used to support the State Education Office. **Use of ARNG FTA funds on anything other than tuition assistance and authorized fees constitutes a misuse of funds.**

c. Duplicate Sources of Funding. Soldiers may use other funding sources in addition to ARNG FTA (i.e. Pell Grants, Montgomery GI Bill, State TA, etc) to pursue coursework at accredited post-secondary institutions based on the following limitations:

(1) State TA and the MGIB (active duty or selected reserve) may be used simultaneously for the same course and exceed 100 percent of the tuition costs.

(2) ARNG FTA and State TA programs can be used simultaneously for the same course. Whenever possible, ESOs will ensure that the State TA program is applied first and then the ARNG FTA program is applied against any remaining obligation; not to exceed 100 percent of tuition costs.

(3) MGIB Selected Reserve (MGIB-SR), Chapter 1606, basic benefit, MGIB Kicker incentive and ARNG FTA may be combined when a soldier is enrolled at least ½ time or more in a VA-approved course or program. The Department of Veterans Affairs defines ½_time as enrollment in between 6 and 8 credits or semester hours, which is generally considered to be enrollment in two classes at the same time. ARNG FTA and the MGIB-SR may be combined and may exceed 100 percent of tuition costs.

(4) Soldiers eligible to receive the MGIB-AD, Chapter 30, the Veteran's Education Assistance Program (VEAP), Chapter 34 or Dependents Educational Assistance (DEA), Chapter 35 are eligible to receive ARNG Federal TA simultaneously for the same course and exceed 100 percent of tuition costs provided they have not contracted for a MGIB Kicker in the ARNG. Soldiers eligible to receive the MGIB-AD, VEAP or DEA who have contracted for a MGIB Kicker in the ARNG may only use ARNG FTA for course(s) that are beyond what is considered full-time enrollment by the school.

(5) In the case where a soldier is eligible for both TA and a Pell Grant, ARNG FTA will only be authorized for the balance of tuition **NOT** covered by the grant.

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7. EDUCATION SUPPORT AGENCIES. The following education support programs are available to assist ARNG soldiers in their educational pursuits.

a. ARNG Institute. This program, which will provide a wide range of educational support services, is currently being re-established at the National Guard Professional Education Center (NGPEC) and is expected to be operational mid-1st quarter, FY03. A complete list of services and contact information will be published under a separate memorandum.

b. DANTES. DANTES provides testing opportunities and certification exams to help soldiers gain additional college credit and credentials. Information on available tests and exams is located on the MA ARNG Education Benefits Web site at <http://www.state.ma.us/guard/education>. Click on the 'Testing' main menu option, then click the 'Civilian Testing Programs' hyperlink.

c. SOC. Servicemember Opportunity Colleges (SOC) (a consortium of over 1,600 colleges/universities) is our primary military liaison to the education community and provides various educational assistance programs for Servicemembers. Information on current SOC programs is available on line at; <http://www.soc.aascu.org>, by phone at; 1-800-368-5622 or by Email at; socguard@aascu.org. To view a list of SOC colleges in Massachusetts visit the MA ARNG Education Benefits Web site at <http://www.state.ma.us/guard/education>. Click on the "Credit for Military Training" main menu option, then click on the 'Servicemember Opportunity Colleges' hyperlink.

d. Military Transcript Services. Before ARNG FTA is authorized, ESOs will ensure each soldier obtains a copy of their military transcript through the Army/American Counsel on Education Registry Transcript System (AARTS) located at; <https://aarts.leavenworth.army.mil>. The AARTS transcript provides the soldier with a list of recommended college credit, according to the American Council on Education (ACE), for the completion of military schools, MOS training courses and College Level Examination Program (CLEP) tests that were taken through a DANTES Test Center. Use of the AARTS transcript will save thousands of dollars in ARNG FTA funds and countless hours of soldier time by not having to complete degree requirements that are accepted by the college/school via the AARTS transcript.

8. MA ARNG POINT OF CONTACT. POC for MA ARNG Education Benefit Programs is the Education Services Officer at DSN 256-6753, commercial (508) 233-6753, or by email at education@ma.ngb.army.mil.

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FOR THE CHIEF, NATIONAL GUARD BUREAU:

Encls

1. DA Form 2171-E, MAR 96 (sample)
2. DA Form 2171-E, MAR 96 (blank)
3. Soldier Statement of Understanding

//s//

ROSS B. DeBLOIS

COL, GS

Chief, Human Resources Personnel
Policy and Programs Division

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